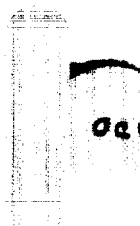


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OCR ADMINISTRATIVE STAFF

GENERAL COMMENTS & RECOMMENDATIONS

The procedures of the OCR Administrative Staff are relatively simple and informal, in view of the large number of personnel in the office. There is little logging or record-keeping, and paper handling has been minimized. Certain functions (such as controlling the zone of consideration for promotions) are left to the operating divisions.

Since completion of our survey, a new Assistant Chief of the Admin. Staff has been appointed and the staff has been directed by the AD/CR to devote more attention to records management and training. However, the problems in utilization of personnel which we discussed with the Staff Chief during our survey appear still to apply, although to a lesser extent.

The delineation of responsibilities between the Assistant Chief of the Staff and the Budget and Fiscal Officer should be clarified, since both are involved in the broader aspects of budgetary and fiscal policy, and this is further complicated by the fact that most of the fiscal bookkeeping is done by a GS-7 Administrative Assistant. This situation was more apparent under the former Assistant Chief, whose background was in budget and fiscal work; the new Assistant Chief is more concerned with other administrative functions and is spending less time on budgetary matters.

The Professional Personnel Officer and the Clerical Personnel Officer are primarily concerned with employee relations, recruitment and training guidance. The clerical position also includes maintenance of the official T/O and assistance in preparation of the portion of the office budget. Reason for the dichotomy between professional and clerical work is that the Office Staff is divided into approximately half in each category.

As in other Offices, OCR's recruitment functions have dwindled considerably, although there is still some of this activity because the on duty strength has dropped below ceiling. The clerical P.O. job includes functions of a clerical nature (e.g. T/O maintenance, time and attendance records) which can, and should, be assigned to the GS-6 Secretary-Typing positions. These positions are now concerned more with training of OCR personnel than they were at the time of our survey, so that it is possible that they are both fully justified. However, in the light of experience of other offices, it does not seem likely that this high level of training activity will be permanent.

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It should also be noted that the OCR Admin. Staff, upon dissolution of the Operation Staff, assumed only two major functions--records management and training--as well as two additional employees and positions. It does not seem likely that training would involve one position full-time even in an Office as large as OCR. Records Management is now being handled by the Assistant Chief and by a clerk.

It is recommended that:

- a. The budget and fiscal function in the OCR Admin. Staff be clarified, so that there is a clear distinction between the Assistant Chief and the Budget and Fiscal Officer.
- b. Transfer T/O and personnel record-keeping functions from the Clerical Personnel Officer to the GS-6 Secretary-Typing.
- c. The Management Staff re-examine the Clerical Personnel Officer position in three months to determine whether the function involved justify a full-time position.

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Procedures - OCR Administrative Staff

A. Personnel

I. Promotions

Memorandum received from division chief requesting promotion, or, after OCR C.S.B. meets, notice of approval is sent down (see vacancy notice procedure) to Admin Staff. (This applies only when the individual to be promoted is to go to a vacant position; not when he's already in the higher-graded position.)

1. [] receives request or notice pulls employee folder and checks for recent Fitness Report (calls division if one is needed); attaches request or notice to folder. To []

2. [] checks for adequate time in grade, checks T/O for slot availability. Back to []

4. [] envelopes original and puts in Out box; puts copy in suspense file.

5. [] receives 1150 and new 1152a; pulls 1152a from suspense, enters on it effective date of promotion. Puts 1152a (old and new) in employee folder and files. 1150 to [] (general interest), to [] (changes T/O), then to division. [] changes Kardex (5x8 card, no form #).

II. Initial Hiring and Placement

1. File or P.H.S. sent from O/P; clerical logs in on 3x5 slip. Enters date on file cover sheet; sends professionals to [] clericals to [] They route to appropriate division; back to []

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- 25X1
3. If individual not to be hired, folder is logged out on 3x5 card (filed alphabetically), sent to O/P. If to be hired, [] types 1152a (O&I), prepares folder and 5x8 card.
 4. See steps 3 to 5 under Promotions.

III. Reassignments Within OCR

Procedure same as for promotions. Admin Staff receives vacancy notice nomination after Career Service Board acts. [] signs 1152a's (all).

IV. Reassignments Outside OCR

Most arrangements are made orally. Gaining office sends 1152a for [] to sign. [] changes T/O book; [] removes Kardex card for employee. When 1150 received, it is filed in inactive file [] folder is destroyed except for material which is of use to gaining office.

V. Separations and LWOP

1. Resignations

- 25X1
- a. [] receives memo from employee. She calls O/P to arrange pre-exit interview and notes on memo the date of the interview.
 - b. [] types 1152a (O&I); to [] (Prof.) or [] (Clerical) to obtain employee's signature.
 - c. [] talk to employee about resignation, obtain signature on 1152a and give to [] to sign.
 - d. See Reassignments Outside OCR.

2. LWOP

- 25X1
- 25X1
- a. [] receives request. Recommends action by [] and []
 - b. If approved, [] types 1152a (signed by []). No further action taken.

VI. Periodic Step Increases

- 25X1
1. [] receives O/P P.S.I. form with listing of names of employees to receive increase. She groups the forms by divisions, sends to divisions.

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2. When returned, signed, she checks off on O/P list and gives to []
3. [] examine to determine whether anyone has been overlooked. Back to []
4. [] marks increase in Kardex, returns forms to O/P. Keeps O/P list for six months.

VII. Fitness Reports

1. Once a month, [] gets O/P listing of due Fitness Reports. She types top of F.R. form and makes a list of reports due by division and sends forms to division.

[Note: This list is unnecessary.
Recommend: Eliminate.]

3. After returned, [] notes rating on her analysis sheet of F.R.'s, sends O&I of F.R. to O/P, files copy in employee's folder.

VIII. Orientation

[] has new employees read OCR Admin. Guide. Divisions have employee fill out necessary forms.

IX. Training Requests

1. Training Request logged in by clerical, reviewed by [] (clerical) or [] (professional and all external). Review to determine if properly completed and whether requested training is reasonable. They sign T.R.'s.
2. Record on ditto'd sheet: name of employee, division, date, course. [This is used for monthly report.] Send to OTR.

X. Vacancy Notice Procedure

1. Ditto master is typed by the division, logged in by Admin Staff clerical. To []

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2. She types a J in front of the slot number; types at bottom of notice "Chief, Admin Staff, OCR" and due date. Determines from division whether there's an OCR candidate for the job and types this on the master. Give master to [] and [] for comments.

[]

4. [] dittons or gives to clerical to ditto and distribute to DD/I Offices. Logged out (loose leaf book). [] keeps copy in a folder.
5. [] receives applications, files copies in notice folder and sends originals to divisions (with employee's folder if an OCR employee).
6. After deadline date [] types listing of vacancies and of candidates for the next OCR C.S.B. meeting, (or subcommittee meeting).
7. After the meeting the division chief notifies selected candidates. []
8. [] destroys copies of applications of unsuccessful candidates. Originals are filed in folder (if OCR employee). If not OCR employee, file with vacancy notice for one year.
9. Division then sends in request for Personnel Action.

XI. Vacancies Outside OCR

1. [] gets notice, adds on due date (earlier than prescribed). Files copy.
2. She receives applications. Types listing of vacancies and applicants for C.S.B. meeting. C.S.B. decides which applications will be forwarded.
3. Sends original of application to office with vacancy (logs out) and sends copy to DD/I; files copy with copy of notice.

B. Budget and Fiscal

I. Budget Estimates

1. Strong sends call to divisions to submit estimates and explanations.

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2. [] brings fiscal records up to date; has [] summarize 08 & 09 estimates by family class and group; [] develops total estimates for travel; [] and Asst. Staff Chief develop 01 estimate totals. Enter totals in prescribed forms.
3. Sent to AD for signature; then to DD/I.
4. Later receive advice of Allotment from Comptroller. [] advises divisions of allotments.
5. [] sets up Property Accounting, Allotment Control, vouchered and miscellaneous obligation records.

II. Imprest Fund. (\$100/mo.)

[] is custodian, [] alternate. Fund established by memorandum to Finance Division requesting an advance. Used as a taxi fund.

Employee doing travel is supposed to call [] to obtain Agency car; if none is available, he then takes taxi. In practice, employees frequently take cabs (without prior authorization), go to Admin Staff and sign a receipt obtain cash.

[] sends in a monthly accounting by individual for advance, signed by [] with signed receipts.

III. Time and Attendance Records

1. [] receive T&A cards, sends to divisions.
2. Division return cards to her, arranged in payroll order. She checks for signatures and then delivers cards to payroll.

IV. Pay Checks

1. [] picks up the checks on her way to work, accompanied by a list prepared by O/P. Checks are arranged by division. Gives checks to []
2. [] pulls out checks and places with appropriate division.
3. Division clerks pickup checks and sign the O/P list.

V. Requisitions

1. Division types requisition master (f. 88). To []

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2. [] obligates in P.A. record; checks cost of item in catalogue (may call vendor or ask division to get price) and inserts on f. 88; checks for sufficient justification; checks record for available funds and stamps requisition; enters on requisition requisition number and sends requisition to B.S.O. for number and voucher number. [] enters latter two in P.A. record. 25X1
3. B.S.O. returns dittoed copy with requisition number, B.S.O. number and voucher number. [] enters latter two in P.A. record. Later receives copy of purchase order and enters price in P.A. record and on requisition. 25X1
4. [] reconciles records each month from Comptroller reports. 25X1
5. Items requisitioned are delivered directly. Admin Staff receives no receipt or information of delivery. [] files copies of requisitions. 25X1

VI. Contracts

Contracts for rental services and for research are handled in the requisition method. Admin. Staff is not involved in personal services contracts except to handle travel vouchers.

VII. Travel

A. Domestic

1. Traveler submits form (no form no.) requesting issuance of travel order to [] 25X1
2. [] types T.O. and Request for Advance; detaches copy of T.O. and files with original request and sends T.O. and Request to AD's Office for signature. 25X1
3. T.O. and Request are returned to [] who then sends T.O. to Central Processing Branch and Request for Advance to Fiscal Division. [] then calls C.P.B. to arrange for tickets. C.P.B. sends over Transportation Request for traveler's signature. 25X1
4. C.P.B. sends over tickets to [] gives to traveler and destroys original request. 25X1
5. Traveler prepares his own Travel Voucher, gives to [] She checks for accuracy, detaches a copy and sends to Comptroller. Files copy with Travel Order. 25X1
 [Note: Every two weeks, [] takes T.O.'s for that period and obligates.] 25X1

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B. Foreign

1. Traveler prepares staff study draft. [] reviews, then to Asst. Chief to review. 25X1
2. [] calls Central Cover Branch to arrange appointment; calls Medical Staff for appointment and fills out Medical Action Request and Report (O&S), sends to Medical Staff. (bottom half is returned and filed in traveler's folder.)
3. Traveler takes staff study draft to C.C.B., then to [] who gets it duplicated and signed by AD. Then distributes. 25X1
4. [] directs traveler for shots, luggage, etc. She types T.O. and Request, gives these to [] (assigns obligation reference number and obligates in record; [] signs T.O.) then to AD for signature. 25X1 25X1
5. Coordinated staff study given to traveler, with T.O., to take to C.P.B.
6. When traveler returns, [] has him write trip report. She has it dittoed, sends copy to each division, AD and DE/I. Traveler prepares Travel Voucher. [] certifies T.V., then to AD. 25X1
7. [] detaches copy of T.V. and sends original to Comptroller, files copy in employee's folder. 25X1

C. Administrative Services

1. Building maintenance, space layout and moves are handled by [] with occasional work by []. There is normally no paper work except a memorandum, written by the
2. Records Management: Handled by [] (50% of her time). Each division has appointed a records officer. 25X1

Forms: [] examines proposed forms, logs in forms, requisition log, sends to Asst. Chief to sign.

Reproduction: Division prepares requisition (f. 70). To [] who records number and sends to Asst. Chief to sign and send to O/L.

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